ONE SPOT Demo to Assist NEW Taxpayers with Filing Non-State Administered (NSA) Taxes in My Alabama Taxes (MAT)

- 1. Add Banking Information
- 2. Setup Local Tax Account Access
- 3. Enter Data on Local Tax Return Table

During the demo, click the buttons or links on the page, do not scroll through the document.



NSA Instructions for MAT Demo

Demonstration steps for taxpayer that has never filed a Local Tax return in MAT:

- Set up banking information. Although recommended as the first step, it is not required. Banking set up may be processed on the payment screen of the Local Tax return and saved as the default payment channel, if chosen.
- Set up Local Tax account access.
 - Select Local Tax.
 - Set the type of access to "File & Pay".
- File Local Tax Return
 - Select the correct filing period.
 - Select "Click here to edit ONE SPOT return table" to add a locality and enter gross amount of sales for the filing period; this link must be clicked even if gross sales are zero. Localities may be added or deleted from the table for a subsequent filing.
 - Add Locality. Start typing locality's name in the first empty "Locality Name" white field to obtain a condensed list. NOTE: There will always be an empty column in the return table for use in adding new localities to the return.
 - o Enter all remaining required information.
 - Select "One-Time Filing" checkbox ONLY if taxpayer does not need to retain information for subsequent filings.
- Discount, Late Fees, and Interest calculations can be viewed in the "Overview" tab. If changes are required, the taxpayer must return to the "Enter Data" tab (previous screen) and select "Click here to edit ONE SPOT return table".
- The taxpayer must confirm the payment information on the Payment screen and select "**Submit**" for return/payment to be processed. The "Submit" button is not available in the demo.

NOTES:

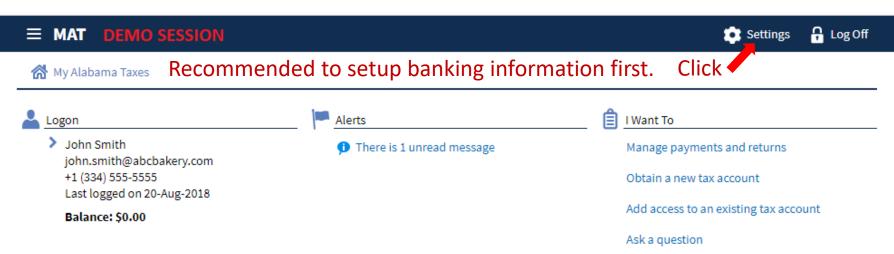
- Demo is not date based. Calculations are made for discount but not P&I.
- Banking set up information shown in Demo does not carryforward to return/payment Demo.

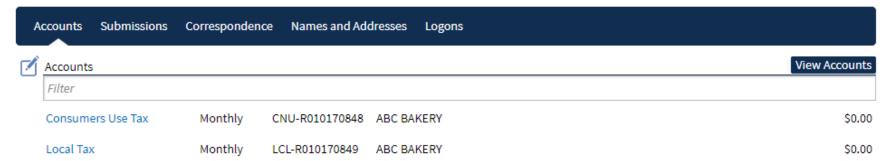
Click here to start Demo



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The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.



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My Alabama Taxes

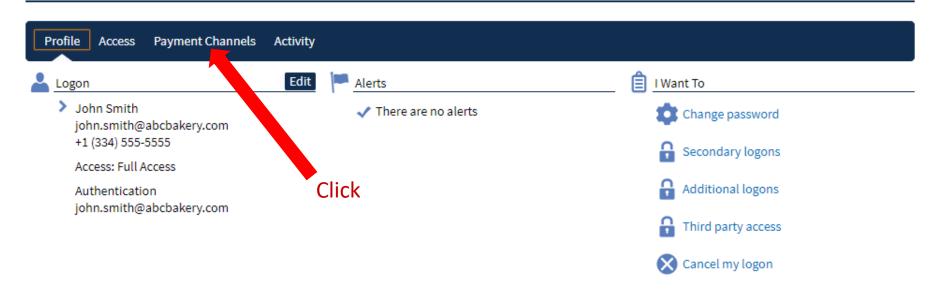
DEMO SESSION



Settings



My Alabama Taxes → Settings





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My Alabama Taxes

DEMO SESSION



Settings



My Alabama Taxes > Settings

Payment Channels Activity Profile Access

Filter

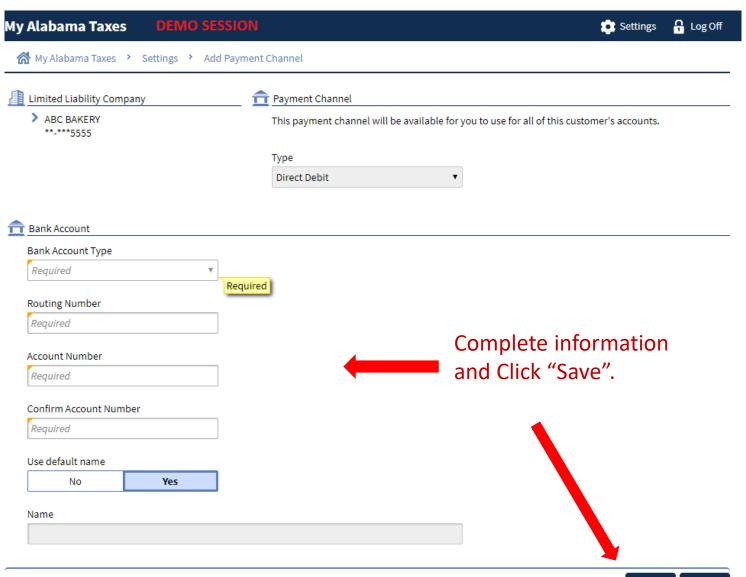
Payment Channels

ABC BAKERY - **-**5555

No default payment channel Consumers Use Tax CNU-R010170848 Local Tax LCL-R010170849



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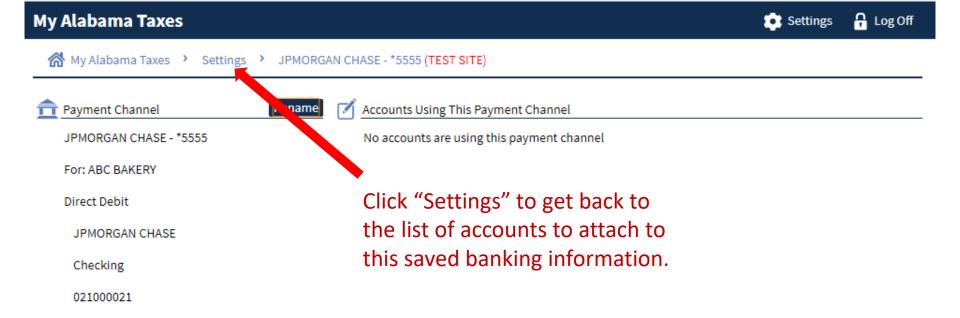


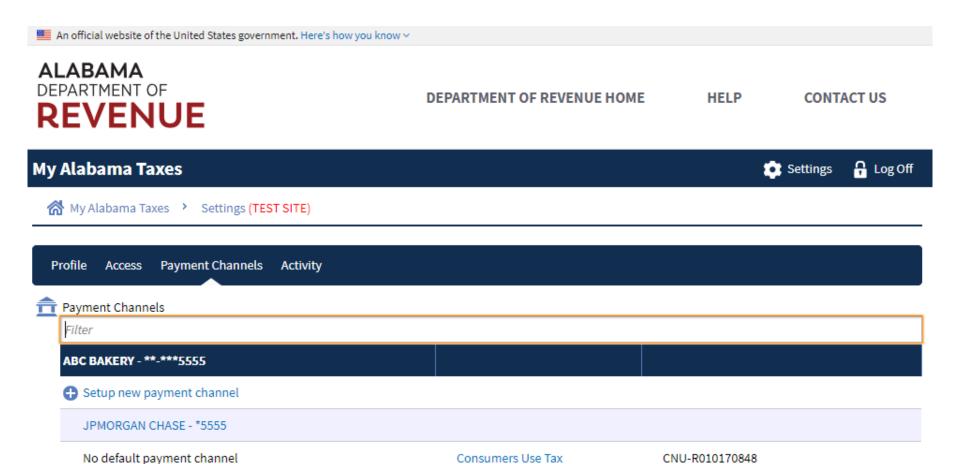
****5555

Remove this payment channel

DEPARTMENT OF REVENUE HOME

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Either tax account type may be selected first; however, this example is for Local Tax.

Local Tax

LCL-R010170849

Click



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My Alabama Taxes

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Settings





My Alabama Taxes > Settings > Select Payment Channel



ABC BAKERY **-***5555

Local Tax LCL-R010170849



n Default Payment Channel

Current Default

No current default

ABC BAKERY - **-**5555

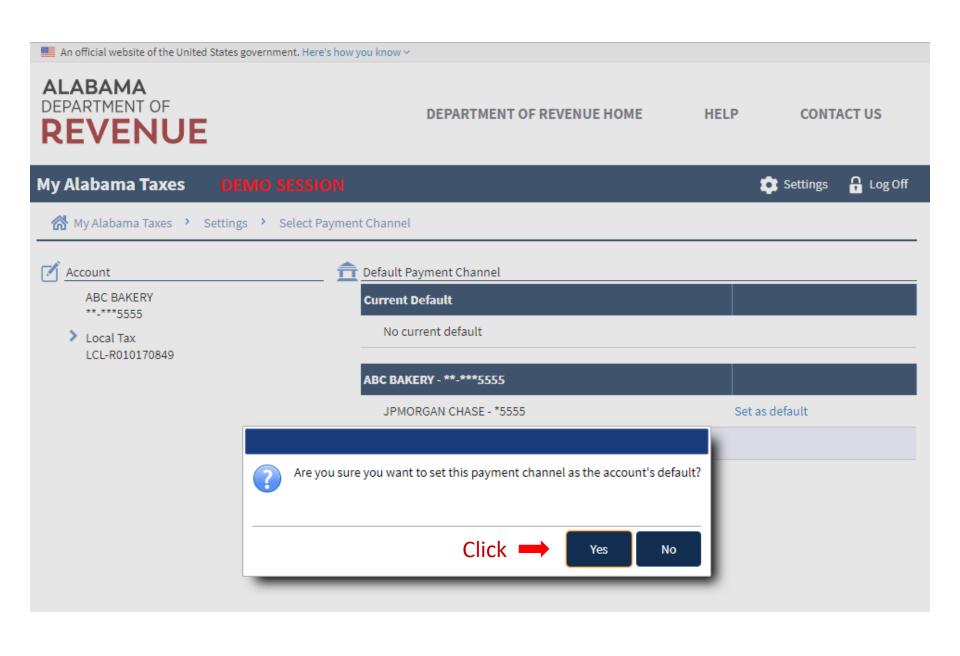
JPMORGAN CHASE - *5555

Set as default Click



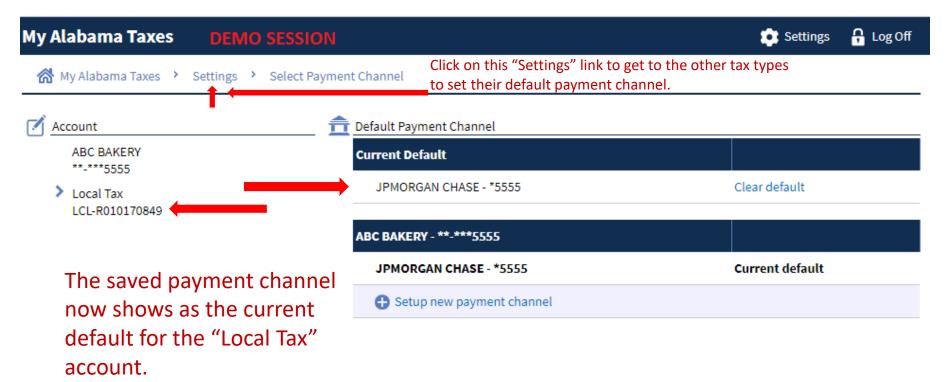


Setup new payment channel



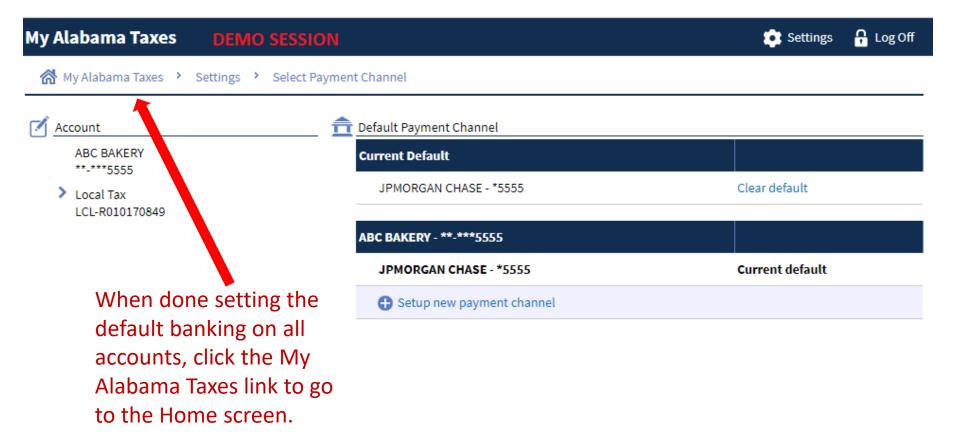


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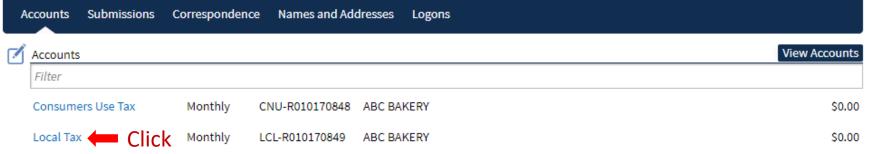




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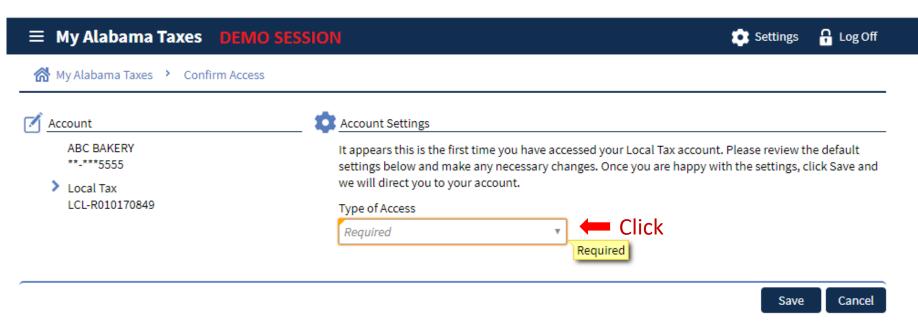
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First time users must set the account access for each of their accounts by clicking the account type link.



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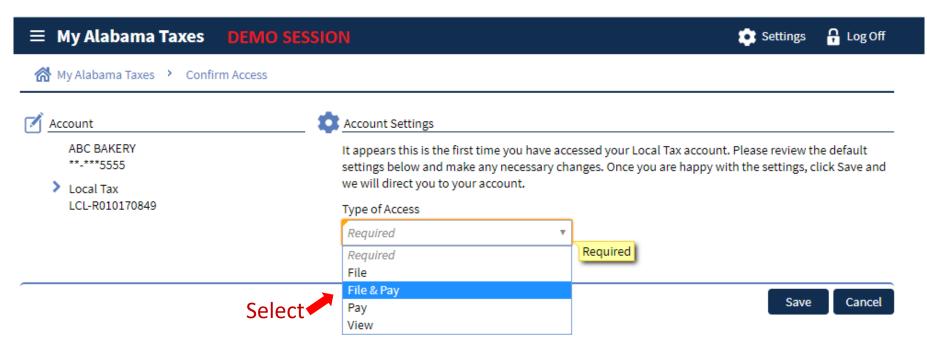


The first time an account is accessed in MAT, the user must set their access type.



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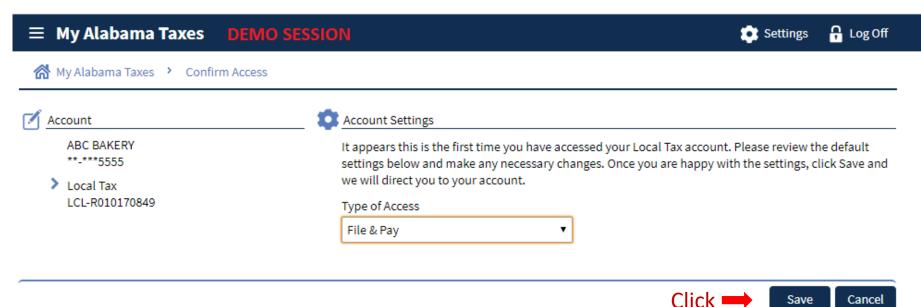
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If the Local Tax account access is set to anything other than "File & Pay," the user will NOT be able to file a return with an NSA locality.

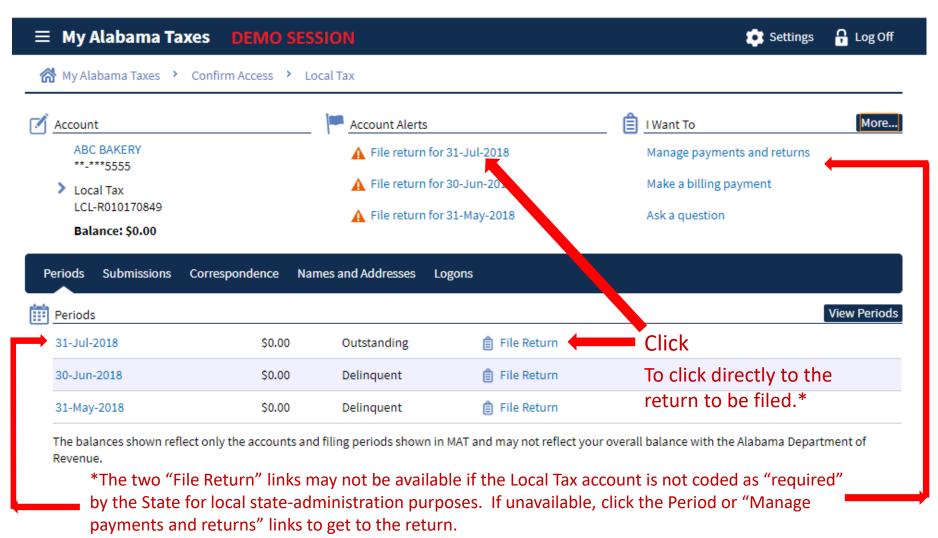


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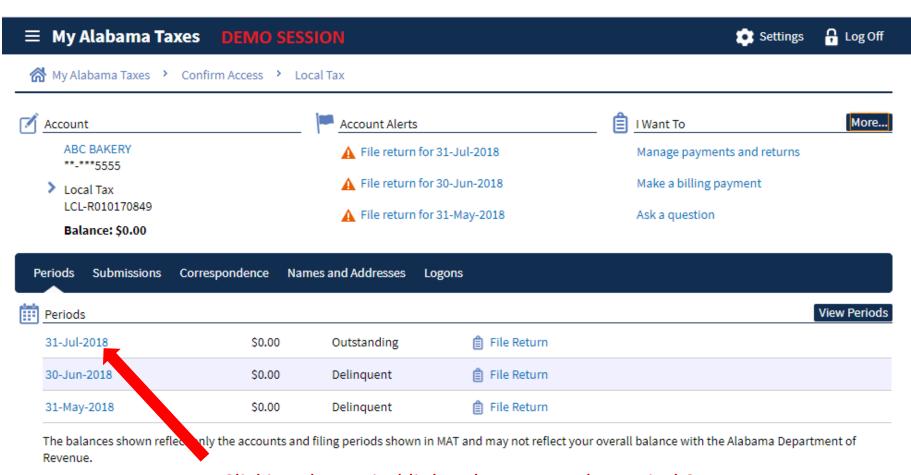
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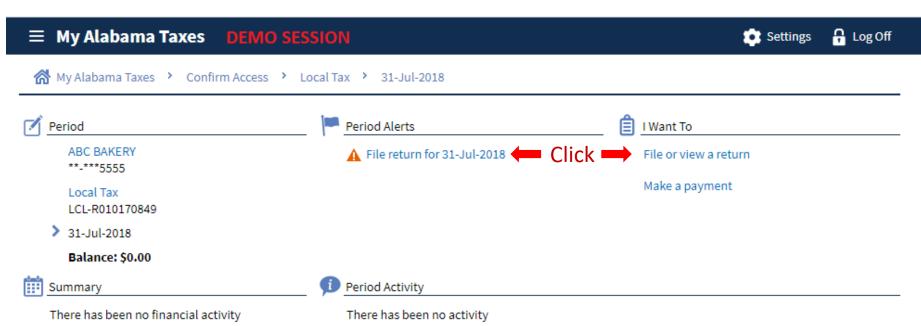


Clicking the Period link, takes you to the Period Screen where you can also reach the tax return to file.



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*The link under Period Alerts may not be available if the Local Tax account is not coded as "required" by the State for local state-administration purposes.



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